



CASE STUDY

How Perlick Used LegalBill to Gain Visibility and Control over Legal Spend



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Overview

When Theodore “T.J.” Perlick Molinari assumed the role of managing the company’s legal department, he encountered a lack of structure within Perlick’s legal operations that left him with minimal visibility into what, how and how much money was being spent on legal services by the company. Over budget and low on resources, Molinari took bold action to ensure that he had access to the information he needed to manage his legal budget with predictability and ease.



Within the first year of implementing LegalBill, Perlick was able to benefit from:



A quick and efficient path to getting the department’s “house in order.”



Identifying accruals and expenses that were unknown, prior to LegalBill.



Improved departmental performance and the ability to operate as a major legal department with limited resources.

Background

Perlick is a national leader in the manufacture of commercial bar and beverage systems and residential undercounter refrigerators and brewery fittings. As a fifth-generation, family-owned business based in Milwaukee, Wisconsin, Perlick has provided innovative, quality customizable food and beverage storage and serving solutions since 1917. Strong family values and a commitment to innovation drive the company’s culture, which it attributes to its 100 years in business and still drives the company’s success today.

Theodore “T.J.” Perlick Molinari is Perlick’s Vice President – Special Projects, General Counsel, and Corporate Secretary at Perlick. Prior to joining the family business as the 5th generation to work at Perlick, Molinari spent 8 years as a litigation defense attorney in the State of Wisconsin.



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Challenges & Objectives:

After assuming his new role as the VP - Special Projects and General Counsel, Corporate Secretary, Molinari made a shocking discovery. Perlick had no centralized way of handling legal matters and accounting for the spending associated with those activities.

Many years of mismanagement had left the legal function at Perlick with no structure, no accountability, no strategic purpose, and no consolidated management of legal spend. Given the lack of attention to spend, Molinari had a limited understanding of how Perlick was doing against a budget, as he had no means to understand internally what was being spent - and, a budget was fragmented across many functions.



At the end of Molinari's first year, Perlick had overspent. This was mainly attributed to the fact that there was no internal system set up to manage legal spend. It was at this point that Molinari made a conscious decision to find a solution that would fit the company's needs for tracking legal spend so that Perlick would never again be in the position of overspending. Without putting a solution in place, the company would once again be in a position of overspending and he would have no means to justify his actions. This was not something that Molinari wanted to contend with. As he explained, "I needed to begin somewhere to understand what was being spent in order to get a handle on things. I was looking for a simple, low cost solution that would fulfill our basic management needs."

"LegalBill offered a quick and easy way for me to get our 'house in order' with a minimal learning curve on my end, which was exactly what I was looking for."

Molinari was introduced to LegalBill through Perlick's insurance company, which offered line-by-line strike thru and bill analysis. With no expertise, or staff available to assist, Molinari took the insurance company's suggestion and researched the product.

After extensively researching numerous viable solutions on the market, Molinari concluded that LegalBill was exactly the solution Perlick needed, as it was designed to meet the needs of small to midsize businesses, without the additional burden of a high-cost solution. It afforded Perlick the ability to improve departmental performance regarding spend, by giving it the ability to function like a big legal department rather than a one-man shop.

As Molinari explained, "LegalBill offered a quick and easy way for me to get our 'house in order' with a minimal learning curve on my end, which was exactly what I was looking for. And, after discussions with Quovant, I was confident in the LegalBill solution it was offering, and we launched the product in January 2020."



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Results:

Upon implementation, LegalBill immediately provided Perlick with the insights that Molinari needed in order to work with the company's accounting department to establish new processes for managing the company's legal spend. With the ability to find expenses that he was not aware of prior to putting LegalBill in place, as well as the ability to allocate expenses to specific budget groups, Molinari was able to operate with a clean book and a new set of processes to bring the company's budget into alignment with spending.

After a little over a year of implementing LegalBill, Perlick is now able to manage its relationships with outside counsel based on a clear set of expectations and policies. LegalBill was able to fill a void by providing professional billing insights that Molinari does not possess, in his role. Perlick is now able to hold vendors accountable when it comes to spend.

Future Plans:

In the coming months, Perlick is hoping to add an additional layer to LegalBill, by upgrading to a hybrid of the product, and adding a compliance analyst to the bill review process. Perlick sees, and understands, the value of adding expertise to the service and expects to see significant results with this feature from the existing solution that has already transformed spend management.

LegalBill can bring sophisticated spend management to your small or midsize legal team.

What are you waiting for?

Reach out to us to learn how we can help your legal department gain visibility into its legal spend so that you can take control of your legal budget.

GET IN TOUCH

